



GOOD JOBS 2014

GALLUP'S GLOBAL PAYROLL TO POPULATION RATE



GALLUP®

COPYRIGHT AND TRADEMARK STANDARDS

This document contains proprietary research, copyrighted materials and literary property of Gallup, Inc. It is for your guidance only and is not to be copied, quoted, published or divulged to others. All of Gallup, Inc.'s content, unless otherwise noted, is protected by copyright © 2015. All rights reserved.

This document is of great value to Gallup, Inc. Accordingly, international and domestic laws and penalties guaranteeing patent, copyright, trademark and trade secret protection safeguard the ideas, concepts and recommendations related within this document. No changes may be made to this document without the express written permission of Gallup, Inc.

Gallup® is a trademark of Gallup, Inc. All rights reserved. All other trademarks and copyrights are the property of their respective owners.

GOOD JOBS 2014

GALLUP'S GLOBAL PAYROLL TO POPULATION RATE

Gallup's Payroll to Population (P2P) metric provides important information about the health of a country's economy that can't be understood from traditional measurements of unemployment or underemployment alone. P2P quantifies the percentage of workers in good jobs, rather than subsistence jobs that do little to raise the individual out of poverty or contribute to the country's economic output. This measure has a strong, positive relationship with gross domestic product per capita, and it tracks closely with more subjective measures such as people's evaluations of their lives and their physical well-being.

Good Jobs 2014 presents the results from Gallup's latest global P2P measurements, based on more than 182,000 interviews with adults in 144 countries and areas in 2014. Gallup's P2P metric estimates the percentage of the adult population aged 15 and older — not just those currently in the workforce — who are employed full time for an employer for at least 30 hours per week. Gallup does not count adults who are self-employed, working part time, unemployed or out of the workforce as payroll-employed in the P2P metric. P2P is not seasonally adjusted.

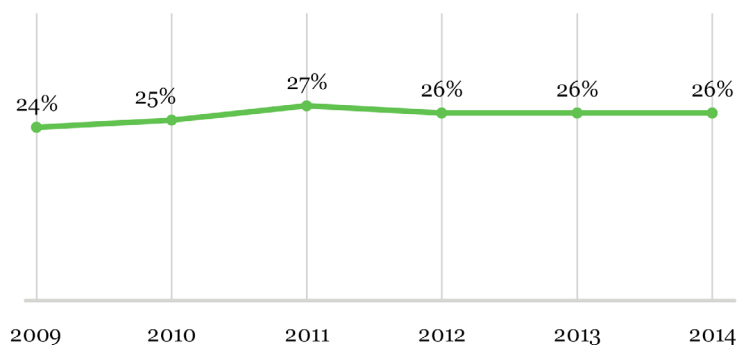
GLOBAL P2P RATE UNCHANGED IN 2014

Gallup's global P2P rate remained stable in 2014, with 26% of the world's adults — or roughly 1.3 billion people — working full time for an employer. This percentage has not grown since 2011.

Worldwide, P2P rates in 2014 ranged from lows in the single digits in countries with large informal economies and high self-employment to about half of the population in some wealthier countries with relatively low unemployment and higher formal economic employment and workforce participation.

Global Payroll to Population Rate

■ % Total adult population employed full time for an employer



2014 PAYROLL TO POPULATION WORLDWIDE



HIGHEST P2P, HIGHEST GDP PER CAPITA

The countries with the highest P2P rates tend to be some of the wealthiest — or those with the highest GDP per capita — such as the United Arab Emirates and the U.S. Additionally, a number of countries on the list, such as Russia and Belarus, likely ranked toward the top because each has many people working directly for the government or government-owned entities.

While Qatar and the UAE led all other countries in P2P by at least eight percentage points, they led neighboring Saudi Arabia by more than 30 points. However, much of this is attributable to their smaller populations and large percentages of expatriates in the workforce.

Countries With Highest P2P Rates in 2014 AMONG THE TOTAL ADULT POPULATION

	P2P RATE
QATAR	62%
UNITED ARAB EMIRATES	61%
BELARUS	53%
LATVIA	49%
RUSSIA	48%
ESTONIA	47%
CANADA	45%
SWEDEN	45%
DENMARK	44%
U.S.	44%

HIGH SELF-EMPLOYMENT IN MANY COUNTRIES WITH LOWEST P2P

Countries with the lowest P2P scores tend to have large informal economies with high self-employment, which at the global level has a negative relationship with GDP per capita. Many of these countries also have lower-than-average workforce participation.

This pattern was present in many sub-Saharan African countries, which tend to dominate the list of countries with the lowest P2P scores every year. In Liberia, for example, nearly half of the population (46%) in 2014 was out of the workforce. It's important to note that these data were collected at the onset of the Ebola outbreak in Liberia and likely reflect the worsening employment conditions there.

Countries With Lowest P2P Rates in 2014 AMONG THE TOTAL ADULT POPULATION

	P2P RATE
LIBERIA	3%
HAITI	4%
NIGER	4%
MALI	5%
BURKINA FASO	6%
BURUNDI	6%
SIERRA LEONE	6%
YEMEN	6%
BANGLADESH	7%
ETHIOPIA	7%
GUINEA	7%
SOUTH SUDAN	7%
TOGO	7%

P2P DROPPED IN NORTHERN EUROPE, FORMER SOVIET UNION

Regionally, P2P rates were the highest in 2014 in Northern America (44%) — which includes the U.S. and Canada — and in Northern Europe (43%) and the former Soviet Union (40%). Rates were lowest in sub-Saharan Africa (11%), as they have been since Gallup began tracking this measure worldwide in 2009.

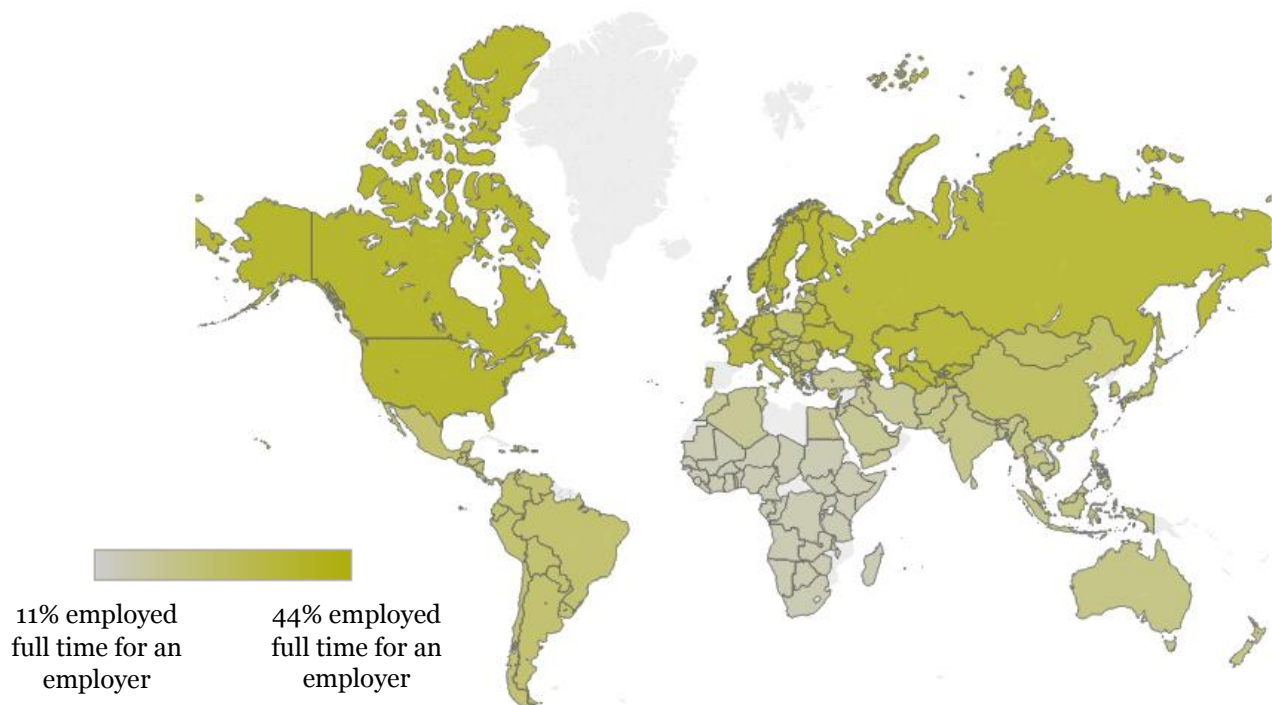
P2P increased by one point in East Asia, Northern America and Western Europe. In East Asia and Western Europe, increases in workforce participation accompanied this uptick. In Northern America, there was lower self-employment in Canada along with higher P2P in both the U.S. and Canada.

P2P dropped two points in Northern Europe and the former Soviet Union, while the percentages working part time inched higher and workforce participation edged lower.

P2P Highest in Northern America, Northern Europe
AMONG THE TOTAL ADULT POPULATION

	P2P RATE	CHANGE BETWEEN 2013 AND 2014
WORLDWIDE	26%	0
NORTHERN AMERICA	44%	1
NORTHERN EUROPE	43%	-2
FORMER SOVIET UNION	40%	-2
WESTERN EUROPE	38%	1
EAST ASIA	29%	1
EAST CENTRAL AND SOUTHEAST EUROPE	29%	0
LATIN AMERICA AND CARIBBEAN	27%	-1
SOUTH ASIA	21%	0
SOUTHEAST ASIA	21%	0
MIDDLE EAST AND NORTH AFRICA	18%	-1
SUB-SAHARAN AFRICA	11%	0

2014 PAYROLL TO POPULATION BY REGION



WORLDWIDE, MORE MEN THAN WOMEN HAD FULL-TIME WORK

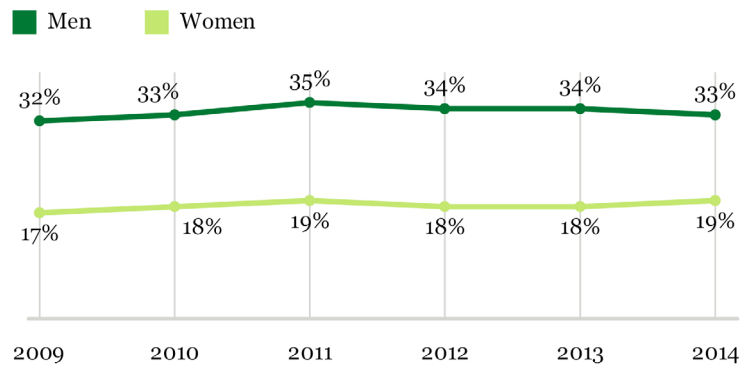
In every region of the world, men continued to be more likely than women to have full-time work for an employer. Worldwide, 19% of women were employed full time for an employer in 2014, compared with 33% of men.

Although the 14-point gap between men and women in 2014 was the narrowest measured since 2009 by one point, percentages have generally stayed within the same range for the past six years.

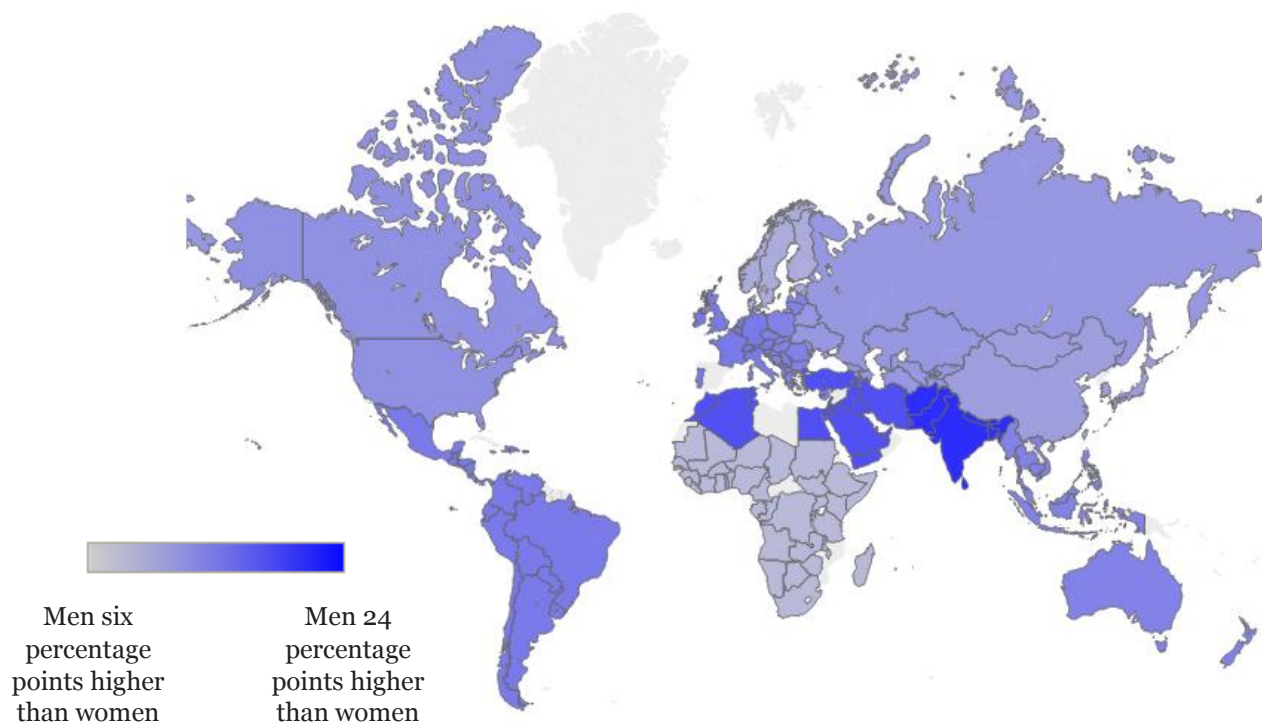
Worldwide, women were about as likely as men to be employed part time or unemployed. They were much more likely to be out of the workforce entirely, however.

Gender Gap in Payroll to Population

Among the total adult population



2014 P2P GENDER GAP BY REGION



GENDER GAP LARGEST IN SOUTH ASIA, MIDDLE EAST AND NORTH AFRICA

Across all global regions, women's deficit in the good jobs market remained largest in South Asia and in the Middle East and North Africa (MENA), where their P2P rates lagged behind men's by at least 20 points. Women in these two regions were also the least likely in the world to be in the workforce. At least two in three women in both regions were out of the workforce in 2014, with many choosing to not participate for cultural or political reasons.

Women's deficit in good jobs was smallest in sub-Saharan Africa, but P2P rates were also among the lowest in the world for both women and men in this region. P2P rates were highest for men and women in Northern America, the former Soviet Union and Western and Northern Europe, but the gender gap was still relatively large even in these more developed regions.

The P2P rate for women did not reach 50% in any country, while the rate for men was 50% or higher in 13 countries. Women tended to have the highest P2P rates in countries with stronger social safety nets and labor market regulations, while the countries with the highest rates for men were a mix of these and more liberal economies.

Gender Gap in Payroll to Population, by Region

	MEN	WOMEN	WOMEN'S DEFICIT
WORLDWIDE	33%	19%	-14
SUB-SAHARAN AFRICA	14%	8%	-6
NORTHERN EUROPE	47%	39%	-8
EAST ASIA	34%	24%	-10
FORMER SOVIET UNION	46%	35%	-11
NORTHERN AMERICA	50%	38%	-12
EAST CENTRAL AND SOUTHEAST EUROPE	37%	23%	-14
SOUTHEAST ASIA	28%	14%	-14
LATIN AMERICA AND CARIBBEAN	34%	19%	-15
WESTERN EUROPE	45%	30%	-15
MIDDLE EAST AND NORTH AFRICA	28%	8%	-20
SOUTH ASIA	33%	9%	-24

Countries With Highest P2P for Women AMONG THE TOTAL ADULT POPULATION

	P2P RATE
BELARUS	48%
ESTONIA	45%
LATVIA	43%
RUSSIA	43%
ISRAEL	42%
SWEDEN	41%
CANADA	40%
NORWAY	40%
SLOVAKIA	40%
CZECH REPUBLIC	39%
DENMARK	39%
HUNGARY	39%

Countries With Highest P2P for Men AMONG THE TOTAL ADULT POPULATION

	P2P RATE
QATAR	74%
UNITED ARAB EMIRATES	73%
BELARUS	59%
LATVIA	58%
RUSSIA	54%
SWITZERLAND	53%
UNITED KINGDOM	52%
NETHERLANDS	51%
CANADA	50%
DENMARK	50%
ESTONIA	50%
TURKMENISTAN	50%
U.S.	50%

SELF-EMPLOYMENT INCREASED SLIGHTLY

Fewer than one in five adults worldwide (19%) worked full time for themselves in 2014, up slightly from 18% the previous year. But rather than a positive sign, higher rates of self-employment often signal poor economic performance. The self-employed are three times as likely as those who are employed full time for an employer to be living on less than US\$2 per day.

Self-employment rates were highest in East Asia (29%), Southeast Asia (29%) and sub-Saharan Africa (23%). While rates in East Asia and Southeast Asia increased by one point in 2014, there was a notable two-point decline in sub-Saharan Africa.

Self-Employment Up in Most Parts of Asia AMONG THE TOTAL ADULT POPULATION

	SELF-EMPLOYED	CHANGE BETWEEN 2013 AND 2014
WORLDWIDE	19%	1
EAST ASIA	29%	1
SOUTHEAST ASIA	29%	1
SUB-SAHARAN AFRICA	23%	-2
SOUTH ASIA	18%	5
LATIN AMERICA AND CARIBBEAN	14%	0
MIDDLE EAST AND NORTH AFRICA	11%	-1
EAST CENTRAL AND SOUTHEAST EUROPE	8%	0
WESTERN EUROPE	8%	1
FORMER SOVIET UNION	7%	0
NORTHERN AMERICA	4%	-1
NORTHERN EUROPE	4%	0

The biggest increase in self-employment in 2014 was in South Asia, where the percentage working full time for themselves rose from 13% to 18%. All of the newly self-employed in South Asia in 2014 were not in the workforce the previous year.

MORE ADULTS IN THE WORKFORCE

The 36% of adults worldwide who were not in the workforce in 2014 was the lowest level measured since 2009. These adults were not employed in the past seven days, either for an employer or for themselves, were not looking for work and/or were not available to start work.

About half of the adult populations in MENA, South Asia and East Central and Southeast Europe were out of the workforce in 2014, but this is largely attributable to the high percentages of women in these regions who choose to not work for cultural or political reasons. While participation was unchanged in MENA, it increased in South Asia (six points) and East Central and Southeast Europe (two points). Notably, none of these new workforce participants took full-time jobs for employers.

Workforce Participation AMONG THE TOTAL ADULT POPULATION

	OUT OF THE WORKFORCE	CHANGE BETWEEN 2013 AND 2014
WORLDWIDE	36%	-1
MIDDLE EAST AND NORTH AFRICA	51%	0
SOUTH ASIA	47%	-6
EAST CENTRAL AND SOUTHEAST EUROPE	47%	-2
LATIN AMERICA AND CARIBBEAN	38%	1
NORTHERN EUROPE	36%	2
FORMER SOVIET UNION	35%	1
SOUTHEAST ASIA	34%	3
SUB-SAHARAN AFRICA	33%	5
WESTERN EUROPE	33%	-3
NORTHERN AMERICA	31%	0
EAST ASIA	26%	-2

UNEMPLOYMENT FLAT AT 8%

Unlike Gallup's P2P rate, which is a percentage of the total population, traditional employment metrics — such as unemployment rates — are based on the percentage of the workforce.

In 2014, the global unemployment rate remained at 8%, the same level it has been at since 2013.

Unemployment rates ranged from 2% in East Asia to 19% in MENA. The 2% unemployment rate in East Asia illustrates how low unemployment figures are not always a good indicator of economic health. East Asia also had one of the highest self-employment rates in the world (29%).

Unemployment Rates AMONG THOSE IN THE WORKFORCE

	UNEMPLOYED	CHANGE BETWEEN 2013 AND 2014
WORLDWIDE	8%	0
MIDDLE EAST AND NORTH AFRICA	19%	2
SUB-SAHARAN AFRICA	13%	0
LATIN AMERICA AND CARIBBEAN	12%	1
EAST CENTRAL AND SOUTHEAST EUROPE	12%	1
NORTHERN AMERICA	8%	2
SOUTH ASIA	8%	-1
NORTHERN EUROPE	7%	-1
WESTERN EUROPE	6%	-2
FORMER SOVIET UNION	5%	0
SOUTHEAST ASIA	4%	-2
EAST ASIA	2%	-2

SURVEY METHODS

Results are based on telephone and face-to-face interviews with approximately 1,000 adults in each country or area, aged 15 and older, conducted in 2013 and 2014. For results based on the total sample of national adults, the margin of sampling error ranged from ± 2.2 percentage points to ± 5.2 percentage points at the 95% confidence level. The margin of error reflects the influence of data weighting. The margins of error for samples at the global and regional levels are much smaller than those at the country level, and the margins of error for subgroups within a population (such as men and women) are larger than for the overall population. In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.



GALLUP ANALYTICS: ANALYZE THE WORLD IN ONE CLICK.

GET MORE INFORMATION ABOUT
GALLUP ANALYTICS TODAY.

EMAIL GALLUPANALYTICS@GALLUP.COM
OR CALL +1-202-715-3131

GALLUP® Analytics



GALLUP®

World Headquarters

The Gallup Building
901 F Street, NW
Washington, D.C. 20004

t +1.877.242.5587

f +1.202.715.3045

www.gallup.com